Location
valley floors, rolling hills, tree-lined mountain sides... each a perfect site for wine grapes with character

Heritage

Climate

Spirit

Soil

Sonoma County
GRAPES
Soil

Climate
long, sunny, temperate days
...summer-morning fog...
Cool nights...the perfect growing season for wine grapes

Location

Heritage

Spirit

Grapes
Soil
rich and loamy, volcanic and well drained...
distinctive and nurturing...the perfect natural chemistry for growing wine grapes
Location
Soil
Climate
Spirit
Heritage
birthplace of Northern California viticulture...generations committed to the land...
the perfect marriage of family and soil for growing wine grapes
care and attention for the vine...patience and balance in the cellar...reflection in the bottle...the perfect teaming of grape grower and winemaker
Sonoma County

<table>
<thead>
<tr>
<th>TOTAL ACRES</th>
<th>VINEYARD ACRES</th>
<th>NO. OF WINERIES</th>
<th>NO. OF GROWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,050,000</td>
<td>63,825</td>
<td>254 Marin County</td>
<td>over 1800</td>
</tr>
</tbody>
</table>
Value of Grape Production to Our County

- Grapes generate 68% of Sonoma County farm revenues, totaling $432 million (2005)
  - Lower yields and prices in 2003 & 2004 compared to 2001 & 2002 resulted in $125 million less in grape sales
  - Higher yields in 2005 resulted in $122 million higher grape revenues than in 2004

- Economic value generated by Sonoma County wine and related businesses totals $8.2 billion/yr (MKF 2005)

- Grapes and wine provide economic growth while preserving agricultural lands
The Sonoma County Grape Growers

- Vineyards are small and owned privately, many by family corporations
- 40% of growers have vineyards less than 20 acres
- 80% have vineyards less than 100 acres
- Grape production is the only crop to profitably support numerous small farming operations
Sonoma County Winegrape Production – 1893 to 2005

- Market forces control vineyard acres.
- Sonoma County grape acres fluctuate with market prices.
- Sonoma County produces grapes for the premium wine segment ($>15/bottle)
Sonoma County Vineyard Acreage

- Grapes grow on 6% of Sonoma County’s land area
- Urban areas occupy over 9% of the land area

% County Land Area

- Pasture
- Forest
- Urban
- Grapes
## Sonoma County Grape Production

<table>
<thead>
<tr>
<th>Variety</th>
<th>Acres</th>
<th>Tons</th>
<th>Price/Ton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chardonnay</td>
<td>16,100</td>
<td>73,800</td>
<td>$1592</td>
</tr>
<tr>
<td>Cabernet Sauvignon</td>
<td>12,700</td>
<td>45,600</td>
<td>$2305</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>11,100</td>
<td>26,900</td>
<td>$2129</td>
</tr>
<tr>
<td>Merlot</td>
<td>7,400</td>
<td>31,600</td>
<td>$1592</td>
</tr>
<tr>
<td>Zinfandel</td>
<td>5,800</td>
<td>17,900</td>
<td>$2306</td>
</tr>
<tr>
<td>Sauvignon Blanc</td>
<td>2,700</td>
<td>12,700</td>
<td>$1435</td>
</tr>
<tr>
<td>All Others</td>
<td>8,000</td>
<td>22,400</td>
<td></td>
</tr>
</tbody>
</table>
# Sonoma County Wineries

<table>
<thead>
<tr>
<th>Cases (1000)</th>
<th>&lt;5</th>
<th>5 to 10</th>
<th>10 to 25</th>
<th>25 to 50</th>
<th>50 to 100</th>
<th>Sub-total</th>
<th>&gt;100</th>
</tr>
</thead>
<tbody>
<tr>
<td># Wineries</td>
<td>101</td>
<td>21</td>
<td>46</td>
<td>16</td>
<td>19</td>
<td>203</td>
<td>38</td>
</tr>
<tr>
<td>Grape Acres Required</td>
<td>970</td>
<td>600</td>
<td>3100</td>
<td>2300</td>
<td>5500</td>
<td>12500</td>
<td></td>
</tr>
</tbody>
</table>
Sonoma County Wineries

- 5 Wineries sell more than 1 million cases
  - Wines are distributed internationally
  - Available at local retail and restaurants

- The vast majority of wineries (168) are small with fewer than 25,000 cases
  - Direct sales are key to their success
Sonoma County Winegrape Commission - Mission

- Increase the value of Sonoma County winegrapes and nurture and protect this agricultural resource for future generations
Sonoma County Winegrape Commission

- Mandatory assessment on grower grape sales
  - 0.5% of gross sales

- Primary objective is to market Sonoma County grapes and wines

- Secondary objective is education
Sonoma County Winegrape Commission

- Primary marketing objectives of the Commission are:
  - Solidify Sonoma County as one of the world’s premier wine growing regions
  - Showcase the quality and variety of Sonoma County winegrapes.
  - Distinguish Sonoma County and its AVAs from other wine regions
  - Expand use of Sonoma County on wine labels.
  - Build demand for Sonoma County winegrapes.
Sustainable Winegrowing Program

- Environmentally Sound
- Economically Viable
- Socially Equitable
Sustainable Winegrowing Program

- Voluntary Grower Self-Assessment
  - Workshops attended by over 300 Sonoma County growers
  - Assessments submitted by 262 growers representing 30% of all grape acres for inclusion in statewide database.

- Chapters include Pest Management, Human Resources, Neighbors & Community, Energy Efficiency, Ecosystem Management, Air Quality

- Sonoma County has greatest grower participation in the state
<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Distinct Vineyard Enterprises</td>
<td>313 enterprises</td>
</tr>
<tr>
<td>Number Of Vineyard Enterprises that Submitted Results</td>
<td>262 enterprises</td>
</tr>
<tr>
<td>Total Acres from 262 Enterprises Assessed and Submitted</td>
<td>18,928 acres</td>
</tr>
</tbody>
</table>
Targeted Education

- Integrated Pest Management
- Erosion and Sediment Control
- Vineyard business seminars
- Vineyard employee education (Spanish)
Challenges Growers Face

- Keeping grape production in balance with wine demand
  - Low grape prices when overproduction occurs
- Imported wines
- Consolidation – Fewer grape buyers

- Satisfying wine consumers
Visit us in Sonoma County!

www.sonomawinegrape.org

Thank You